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Access pack for the NHS e-Referral Service training environment v 2.0

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High Level Outline

Before you start seeing the full details, the outline below shows you, in simple term, what you will need to do to access training environment.

What do I want?

- To be able to access and train on training environment, which is secure and can demonstrates all functionality of the NHS e-Referral Service

What's required?

- Access to training environment, via alternative smartcards and computer settings
- A data pack, which will include patients and organisations
- Smartcard users to be set up and an RA smartcard issued
- End point integration, eg ability to link to a GP clinical system or Patient Administration System to book appointments

What do I have to do?

- Request access to training environment
- Request a data pack, access to an End Point, etc.
- Complete forms to enable the above
- Produce smartcards (your RA team)
- Set up services, referrals and scenarios within training environment

What if we already access T Spine?

- If you have access to Training Spine (previously T Spine), you can fast track through the process and will only need to request NHS e-Referral Service roles for existing smartcards.

Who's involved?

- HSCIC's Environment Management Team, including the Test Data team
- Your own IT and Registration Authority teams
- HSCIC's e-Referral Service team

How long will it take?

- Access to Training Spine? Your request should only take 1-2 weeks.
- If you do not, it could take up to 8 weeks to complete the request.

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Background

The NHS e-Referral Service went live in June 2015 to replace the Choose and Book system. At this point some of the training tools which were available for Choose and Book end users were no longer valid and it was not viable to update these given the future release model for the new service.

Although guidance and documentation was available for end users, a 'self-contained' environment, that users could train and learn from, would no longer be available. The NHS e-Referral Service training team understood that there was a need to provide some form of tool for the NHS e-Referral Service to support the system end users.

An environment, which was a mirror of the NHS e-Referral Service, was created for this purpose. The benefit of this environment was that it could be updated in conjunction with the live environment, with all future system changes being reflected immediately, and that users could specify their own data. Access to this environment is a longer process than previous requests, for the Choose and Book tools, due to the requirement for HSCIC to action tasks to allocate or create organisations, create endpoints, set up users and smartcards and any additional local configuration/support needed.

Introduction

NHS e-Referral Service offers a training environment to end users and trainers to access. This environment is known as training environment.

This environment is managed by the HSCIC Solution Assurance Environments Management Team (SA EMT) and is linked to a replica of the national Spine. As training environment uses different registry settings (configuration settings on the PC that direct the connection to the correct environment) to that of the live environment therefore, changes will be required to enable the environment to work locally.

The information in this document informs end users the following to gain access to training environment and gives:

- The benefits of using training environment
- Step by step information on what you need to do
- Specify how much you need to do, which is dependent on your/your organisation's current position
- Details of how the process works, including estimated timeframes
- Information about who you need to contact both locally and at HSCIC

Once you have all the necessary access, our user manual will help you set up services, referrals, training sessions etc. The user manual can be found on our website at
http://www.hscic.gov.uk/referrer/training/environment

Why use the training environment ?

Having access to a training environment which mirrors the live NHS e-Referrals Service gives users the ability to:

- train on a 'live like' system, without the risk of altering real data
- request data (patients, organisations eg hospitals, GP practices, clinicians, admin users etc) to suit your organisation's training requirements
- link with external systems to give an integrated training experience (eg GP systems, patient administration systems)

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- Patient data is reset on a nightly basis, so any changes to PDS data made during a training session will be ‘reset’ for sessions the following day. For example, if a test patient’s name and address is changed during training, it will revert back to its original form during the overnight reset.

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Requirements

Requirement	Details	Who requests/supports this?
N3 Connection	The training environment can only be accessed via an N3 connection.	Requestor & Local IT Department
Smartcards	Separate smartcards are needed to access the training environment	HSCIC Requestor & Local RA
Suitable registration settings	Registration files will allow you to access training environment, via Training Spine This will need to be switched back (to the live registry settings) to access live NHS e-Referral Service	HSCIC Requestor & Local IT Department
training environment web address (URL)	This needs to be set up on each computer being used	HSCIC Local IT Department
Data	The data pack HSCIC sends you will have patients, organisations and users and will need to set up data (services/referrals) against these.	HSCIC Requestor
Link to an End Point (PAS/GP clinical system)	Allows end to end training by linking to GP clinical systems and/or a booking system.	HSCIC Local IT Department

More information on the above can be found within this pack.

Once you have completed an initial form and returned it to HSCIC, they will contact your local IT Department to set up access to training environment from a technical perspective. This should include:

- **Linking to an end-point (GP system or provider booking system/PAS)**
- **Ensuring computers being used are able to access the system**
- **Setting up registry settings, web links etc.**

Although you will probably need to be involved as well!

Recommendation
It is recommended that, wherever possible, training using training environment is carried out in a training room on a specific computer or laptop.

Note that if you are using a laptop to train on site, you will need an N3 connection to access training environment.

This will make it simpler to set up and use the alternative registry settings needed to access training environment. More information on the alternative is detailed in the “How it works” section.

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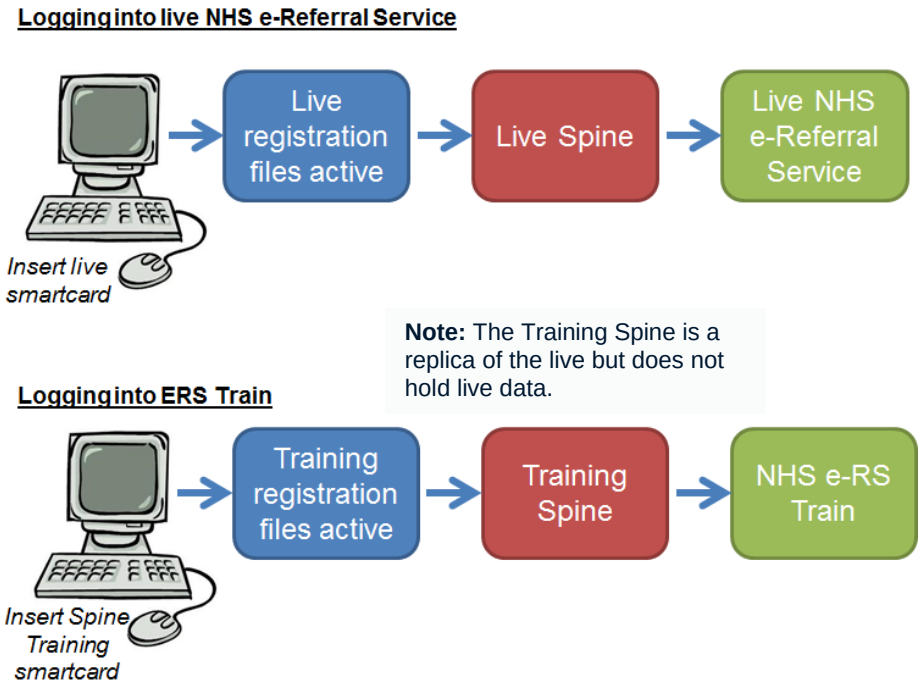
How it works

The diagram below explains how users currently access the live NHS e-Referral Service and how they would access the training environment.


Logging into live NHS e-Referral Service
Live registration files active
Live Spine
Live NHS e-Referral Service
Insert live smartcard
Note: The Training Spine is a replica of the live but does not hold live data.
Logging into ERS Train
Training registration files active
Training Spine
NHS e-RS Train
Insert Spine Training smartcard

Alternative (New) Registry Settings

Alternative (new) registry settings (file attached later in this document) are required to access the training environment:

- You may not realise it, but each computer accessing Spine has a registry setting configured, which includes the correct URLs to direct the connection to the required environment.
- To access the training environment , you will need to use the registry setting for the Spine Training environment. You will also need to keep a copy of the 'live' registry setting so that you can return to accessing the live environment.

This needs to be installed on each computer being used during training by your local IT department. You may need Admin rights to be able to install and change the registry settings on a computer.

Switching between registry certificates (Live and Training)
The person responsible for training needs to know where these files are located so that they can point the computers to the right registry certificates and switch them back, as necessary. These settings are retained until changed, therefore shutting down the PC will not revert the settings back to the default (Live).

Note: If you have a dedicated training room, computer or laptop you may not need to switch back. It could be that you set up the registry settings to point to the Training Spine, which can be left in place. However, if you need to use any live environment you will need to switch the registry settings back to the live one.

Once you have access the user manual, which can be found on our website at http://www.hscic.gov.uk/referrer/training/environment, will give you checkpoints for setting up training sessions.

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Implementation – Starting from Scratch

Important to Note:

If you or your organisation already has access to the Spine Training environment then:

- You will only need to request roles to be added to existing Spine Training (previously T Spine) smartcards and to ensure that you have right registry settings set up on the required computers.

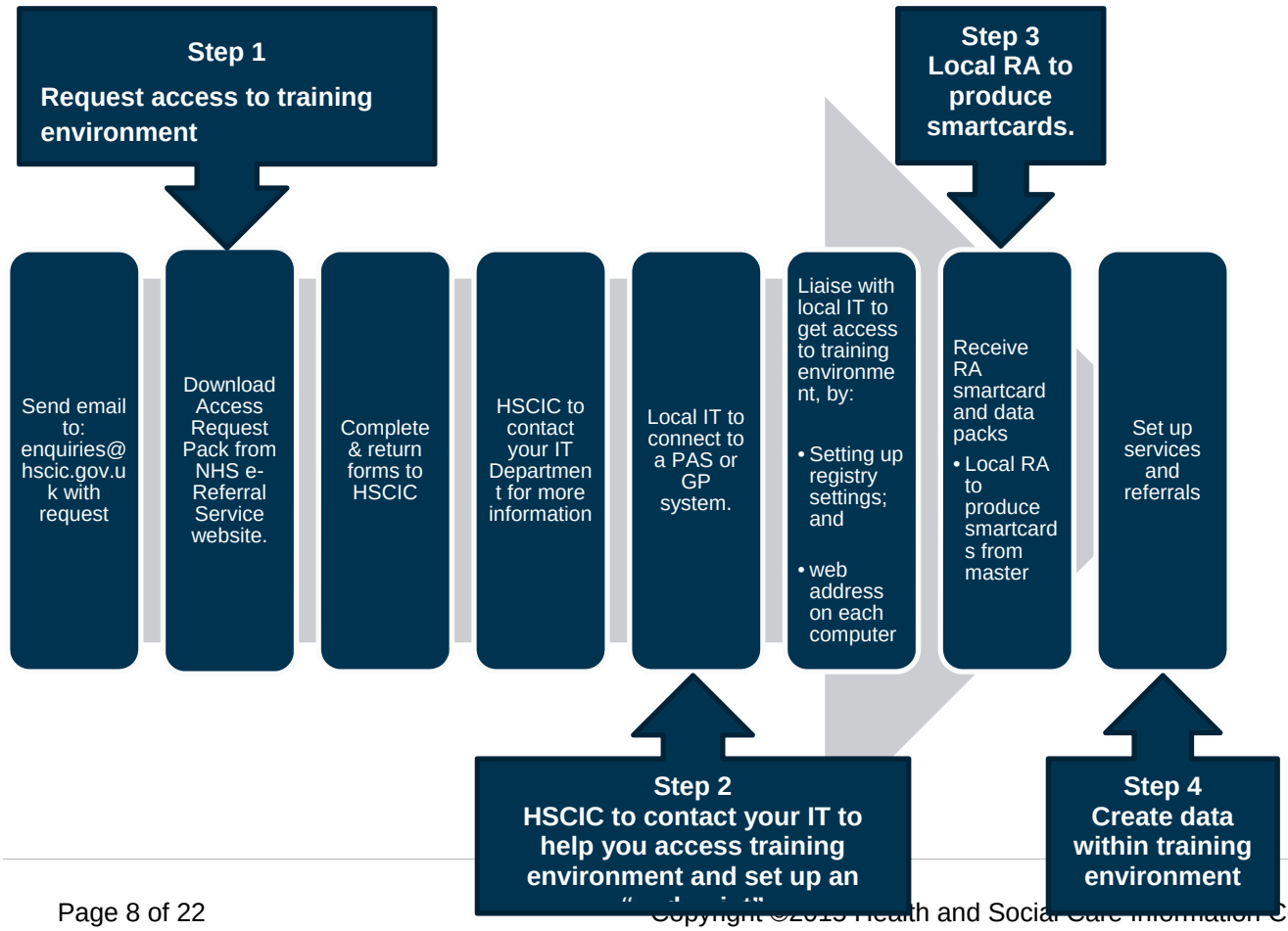
You can check this with your local IT Department before you start, as this will save you a lot of time. Organisations often already have access to a path to live (sandpit) environment for testing, but this does not mean that the connection will be automatically configured in the Spine Training environment.

If this is the case, you can move on to the Implementation – Already Accessing Training Spine (T Spine) section of the document.

If you or your organisation does not already have access to the Spine Training environment then you should be aware of the following:

- Enough time should be allowed to request smartcards and data – this can take up to 10 working days for smartcards and up to three weeks for test data requests.
- Local IT need to install the registry files on each required PC.
- If you want to link to a GP Clinical System or Patient Administration System (PAS)/Provider Booking System, this will need to be configured locally and will likely require an End Point Registration.

a. Initial Set up Process – Starting from Scratch


Step 1
Request access to training environment
Send email to: enquiries@hscic.gov.uk with request
Download Access Request Pack from NHS e-Referral Service website.
Complete & return forms to HSCIC
HSCIC to contact your IT Department for more information
Step 2
HSCIC to contact your IT to help you access training environment and set up an
Local IT to connect to a PAS or GP system.
Liaise with local IT to get access to training environment, by:
• Setting up registry settings; and
• web address on each computer
Step 3
Local RA to produce smartcards.
Receive RA smartcard and data packs
• Local RA to produce smartcards from master
Step 4
Create data within training environment
Set up services and referrals

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b. Implementing - What to expect/do when completing each step of the process

Step 1

Read the information in this pack and request access to training environment by:

- ✓ Emailing HSCIC's Solutions Assurance Helpdesk (sa.servicedesk@hscic.gov.uk) and requesting access to training environment, via Training Spine. You should receive:
  - A pro forma to complete and return
    - See Appendix A for more information
    - If possible, include contact details for your IT department or system administrator in the email returning your completed pro-forma, so that HSCIC can contact them for further information.

- ✓ Your request will be evaluated and you will receive the following forms to complete and return:
  - a test data request form (to request an assigned organisation in Spine Training and a selection of data including test patients) to use with ERS Train; and
  - A Registration Authority (RA) smartcard for use with Spine Training, that can be used to produce your training environment Smartcards.
    - See Appendix B for advice on what organisations to request and Appendix C for suggested smartcard roles to request

Step 2

Once they have the required information, the Solutions Assurance team at HSCIC will contact your IT Department and advise them how to:

- set up the alternative registry setting files
- an "end point", which could be a GP clinical system and/or provider appointment booking system (PAS – Patient Administration System).
  - The latter could be a PAS within your organisation or a synthetic PAS that HSCIC can give your organisation access to.
  - A synthetic PAS may be a simpler solution than your own PAS but it will only allow you to book and cancel appointments. This could be useful if you are training referring organisations and do not have a PAS of your own.
- Web links to training environment for each computer to be used for training

Note: You will probably need to be involved in this to ensure that your IT Department carry out this task.

Use the documents below to support you and your local IT Helpdesk to do the above.

Registry Setting File Instructions	IT Infrastructure Support Document
Registration File Instructions.docx	Technical Spec Document.docx

Step 3

- ✓ Once you have received your (master) RA smartcard, you should liaise with your local RA to produce the following:
  - training environment **smartcards**:

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- Your local RA will need to use a computer with access to the appropriate registry settings, ie the same as required for each computer accessing training environment; and
- Will need to use the following to access the CIS software linked to the training environment's Spine:
  - Web address : https://portal.tsp.national.ncrs.nhs.uk/
  - Select option Launch Care ID

- A **data set pack** to use in conjunction with the correct registry certificate and environment web address, which is https://nww.train.ers.ncrs.nhs.uk.

You will need to liaise with your local IT department to put the registry certificate on computers as admin rights are required to do this.

Step 4

✓ Once you have received your data pack and smartcards to access the data within training environment, you will need to set up data to enable training. Data will include one or more of the following:

- services
- referrals
- data on worklists
- enquiries
- information (for reports, etc).

There is a User Guide to support you with the above, which you can find on our website at: http://www.hscic.gov.uk/referrer/training/environment

You will need to set enough time aside to do this, especially initially, as setting up your services may take some time.

Remember you will need to switch between registry files to move from the live environment to the Spine Training environment. You can do this by clicking on the appropriate registry file before you enter the relevant smartcard. You will need to click on the registry file every time you change between the two environments.

Some organisations even have a switcher to allow you to easily move from one environment to another.

Recommendation - It is recommended that, for easy access, you put:

- a shortcut to the above url https://nww.train.ers.ncrs.nhs.uk on each computer desktop; and
- a folder onto each desk top containing the registry files

See our summary on the next page of how to work with HSCIC EMT to achieve the above.

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Summary – Requesting Access for training environment

What should I ask for?

- Email HSCIC's Environments Management Team (EMT) at sa.servicedesk@hscic.gov.uk
- Your initial request should ask for access to training environment

What's next?

- EMT will ask you some questions to help identify your needs
- For example, do you have access to Training Spine already?
- This will help prevent unnecessary form filling and/or delays

And then what?

- You will need to complete several forms they send you, which will be dealt with by various EMT areas

Which ones and why?

- HSCIC SA EMT Spine Training Environment Requirements Pro Forma
- Test Data Request Form
- Train_e-RS_UserRequirements Form
- MASTER v103_FULL_pdstestdata
- **See below for more details**

- **HSCIC SA EMT Spine Training Environment Requirements Pro Forma**
  - To request access to training environment
  - SLA for completion is 1-2 weeks
- **Test Data Request Form**
  - To detail how many users, what used for, etc
  - SLA for completion is 1 week
- **Train_e-RS_UserRequirements Form**
  - To request users, a master smartcard and roles for those users.
  - SLA for completion is 1-2 weeks
- **MASTER v103_FULL_pdstestdata**
  - To request Patient Data required – for simplicity and speed request a Sample Pack of patient data.
    - Patient data is only loaded on a Friday evening after 18:00, normally load takes places within 2 weeks of request
    - SLA for completion is 1-3 weeks

IF YOU ALREADY HAVE ACCESS TO TRAINING SPINE YOU WILL NOT NEED TO COMPLETE ALL THESE FORMS. THE TEST DATA TEAM WILL ADVISE YOU ON WHAT IS REQUIRED.

Also see **Appendix A** for a set of the above current forms (as at September 2015) and guidance on how to complete them.

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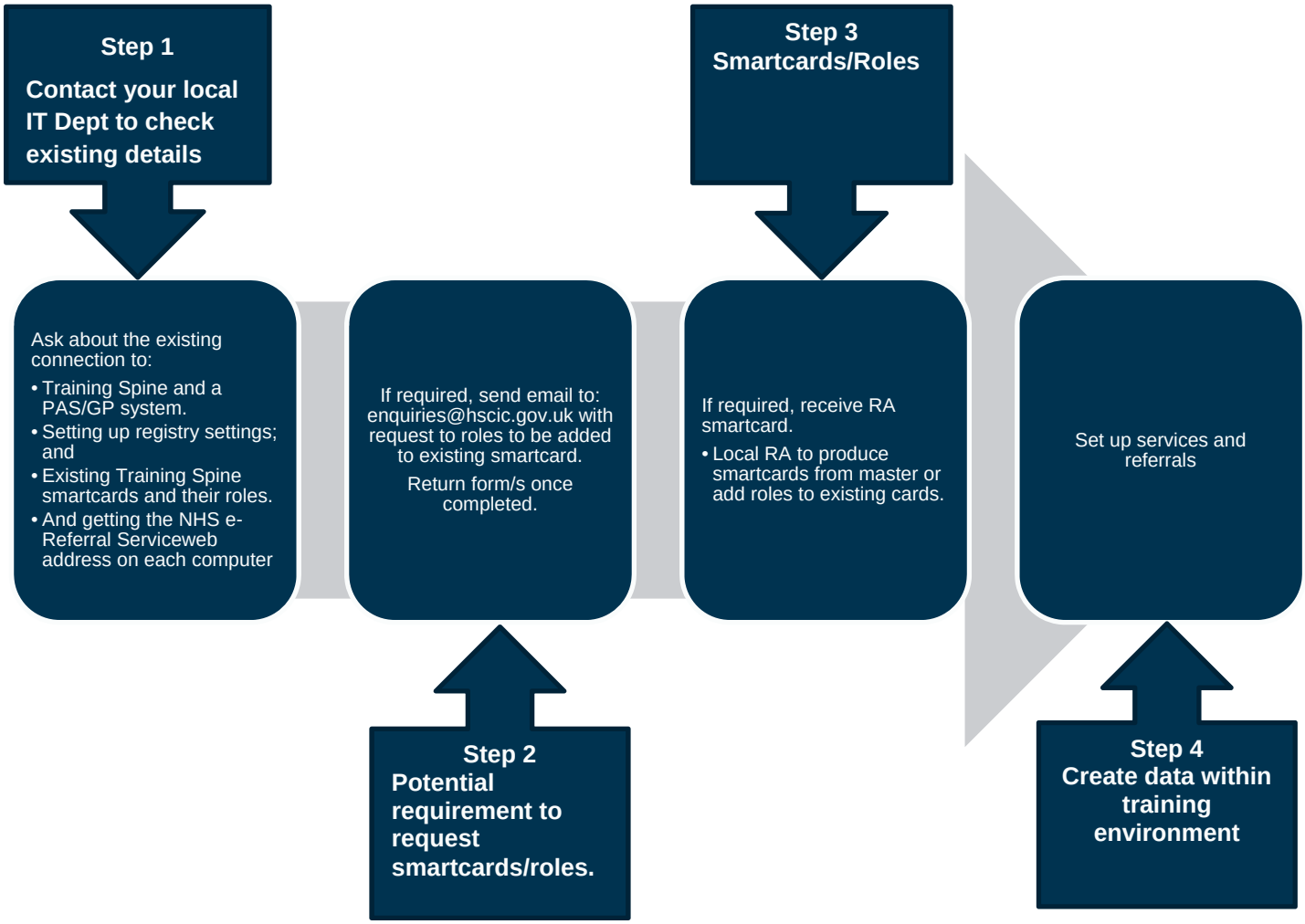
Implementation – Already Accessing Training Spine (T Spine)


Step 1
Contact your local IT Dept to check existing details
Ask about the existing connection to:
• Training Spine and a PAS/GP system.
• Setting up registry settings; and
• Existing Training Spine smartcards and their roles.
• And getting the NHS e-Referral Serviceweb address on each computer
Step 2
Potential requirement to request smartcards/roles.
If required, send email to: enquiries@hscic.gov.uk with request to roles to be added to existing smartcard.
Return form/s once completed.
Step 3
Smartcards/Roles
If required, receive RA smartcard.
• Local RA to produce smartcards from master or add roles to existing cards.
Step 4
Create data within training environment
Set up services and referrals

Step 1

- ✓ Contact your local IT Department about existing details, such as:
  - o Are you already connected to an "end point"? For example a GP clinical system or PAS (Patient Administration System)
  - o Can the computers you will be training on access the registry settings for Training Spine, and therefore training environment?
  - o Do you already have smartcards that will access Training Spine? If so, do they have some NHS e-Referral Services roles on them already?
  - o A data pack that gives you organisations and patients that can be used in a sandpit environment (ie training environment).

Step 2, if required

- ✓ If you need any of the above, please email enquiries@hscic.gov.uk with the requirement you have for smartcard roles to be added to existing smartcards.
  - o See Appendix C of this document for more information.

Step 3, if required

- ✓ Once you have received your (master) RA smartcard, you should liaise with your local RA to produce the following:
  - training environment **smartcards**:

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- Your local RA will need to use a computer with access to the appropriate registry settings, ie the same as required for each computer accessing training environment; and
- Will need to use the following to access the CIS software linked to the training environment's Spine:
  - Web address : https://portal.tsp.national.ncrs.nhs.uk/
  - Select option Launch Care ID

- A **data set pack** to use in conjunction with the correct registry certificate and environment web address, which is https://nww.train.ers.ncrs.nhs.uk.

You will need to liaise with your local IT department to put the registry certificate on computers as admin rights are required to do this.

Step 4

- ✓ Once you have received your data pack and smartcards to access the data within training environment, you will need to set up data to enable training. Data will include one or more of the following:
  - o services
  - o referrals
  - o data on worklists
  - o enquiries
  - o information (for reports, etc).

There is a User Guide to support you with the above, which you can find on our website at: http://www.hscic.gov.uk/referrer/training/environment

You will need to set enough time aside to do this, especially initially, as setting up your services may take some time.

Remember you will need to switch between registry files to move from the live environment to the Spine Training environment. You can do this by clicking on the appropriate registry file before you enter the relevant smartcard. You will need to click on the registry file every time you change between the two environments.

Some organisations may have a switcher to allow you to easily move from one environment to another – check with your local IT Department.

Recommendation - It is recommended that, for easy access, you put:

- a shortcut to the above url https://nww.train.ers.ncrs.nhs.uk on each computer desktop; and
- a folder onto each desk top containing the registry files

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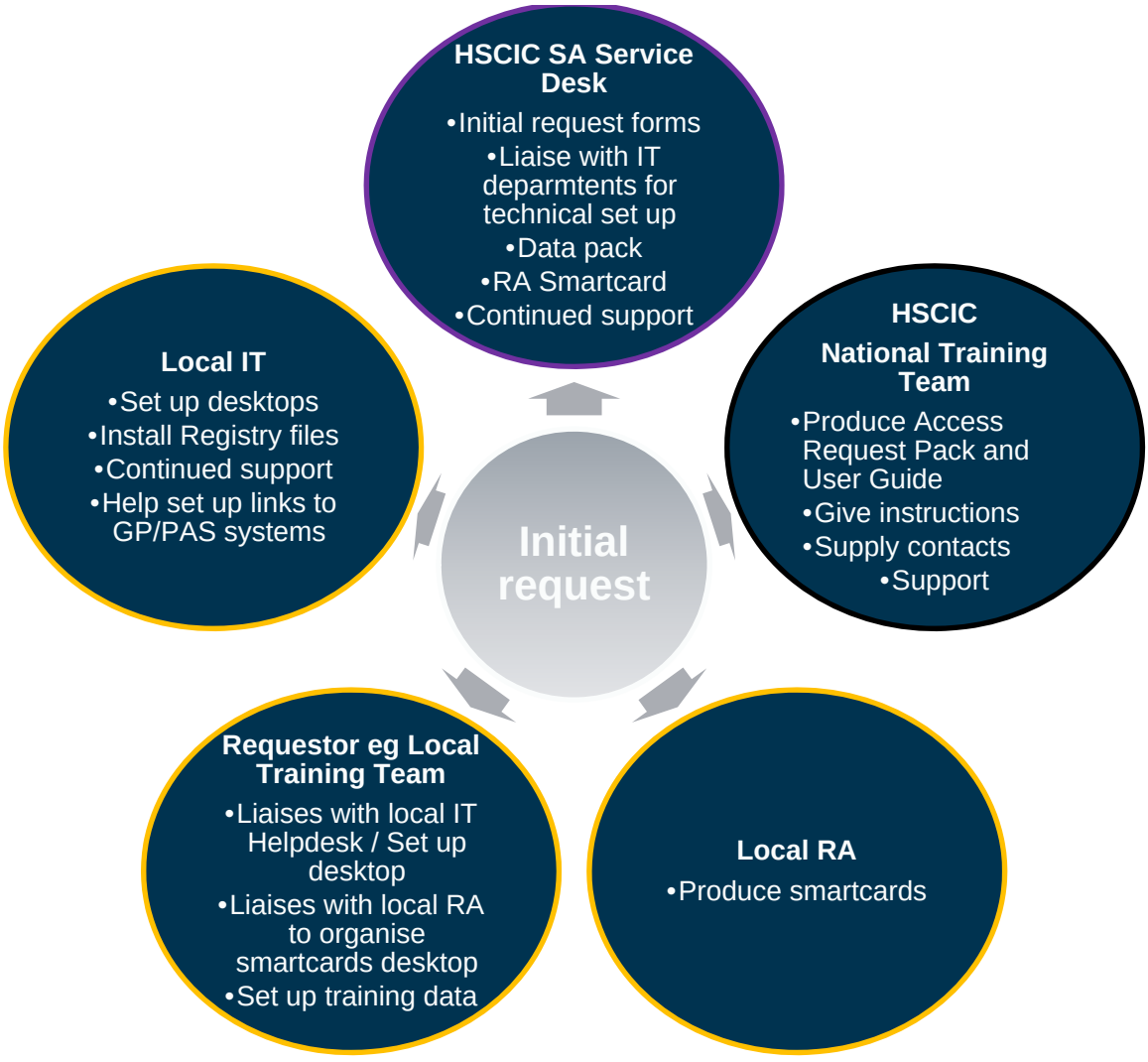
Summary of who does what

Below we have summarized the actions that need to be carried out by each party.



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Maintenance and New Releases

Maintenance and new releases will be put into training environment on a weekly basis. This is to ensure that the environment mirrors the live NHS e-Referral Service and any issues are resolved regularly.

This will happen on a Friday morning between 7.00 am and 8.00 am and training environment **will not** be available during this period.

Reporting Issues/Support/HSCIC Contacts

Who to report an issue to will depend on what the issue is.

For example, if the issue is around your desktop configuration your local IT Helpdesk should be able to support you but if the issue is about getting your data pack, then it would be the HSCIC Test Data Team.

Contacts

Team	Email
Environments Management Team Initial request; Spine Training queries, etc	sa.servicedesk@hscic.gov.uk
Test Data Patient; user and organisation data, etc	testdata@hscic.gov.uk
Local Issues Smartcards, GP/PAS integration; registry settings	Your local IT Helpdesk; or Your local RA Agent
National NHS e-Referral Service Training Team General queries	http://www.hscic.gov.uk/referrals/contact

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Glossary of Terms

Term	What it means	Explanation
End Point	The other system/s you are going to connect to.	This might be a GP clinical system supplier environment or Patient Administration System (PAS).
Training Spine (formally known as T Spine)	Replica of the live Spine	Allows access to test/training data (patients and organisations)
Registry Settings	Settings on a computer that allows smartcards to be used	Each computer that uses smartcards needs registry settings. Training environment requires an alternative set of registry settings to other environments.
EMT	Environment Management Team	The name of the collective team that look after HSCIC's environments, including training environment.
RA	Registration Authority	RA issue and manage smartcard use. Each NHS organisation has an RA Manager or Agent to do this, who are often based within the HR or IT department.
Data Pack	Pack of synthetic patients and organisations.	These synthetic patients and users plus organisations can be used within e-RS Train to support training scenarios.
SA	Solutions Assurance	Part of the Environment Management Team at HSCIC. Their helpdesk is the initial gateway to your training environment request.
Training Spine	A replica of the Spine	Training Spine (previously T Spine and also known as just Training). This environment facilitates training by holding fake patient data on this Training Spine.
PAS	Patient Administration System	An electronic booking system (mainly) used by providers eg hospitals.

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Appendix A – EMT Proformas Explained

Document	Explanation	Example/Guidance
Test Data Request Form_v2.1.xls	This document asks you to give a high level description of your requirements and will be sent to you following your initial request.	Some of this form is completed for you (e.g. Target environment is set to TRAINING, Test Phase is set to Training etc).
HSCIC SA EMT Spine Training Environment	This document asks you to set out your requirements, such as the environment you want access to, end point connection date, data load requirement. The reference to the "PDS data reset" only refers to patient data <u>not</u> referral data. For example, if you change a patient's date of birth this will be reset overnight. If you book a patient an appointment, the appointment <u>will not</u> be cancelled.	• Environment = Request access to **e-Referral Service** • End Point reference – refers to the GP clinical system or patient access system you want to enable connection to. • End users – refers to who you want to access training environment. Eg Trainer/s and learners. Give yourself enough time when putting in your request – it is suggested 2-4 weeks before any training dates. Ensure you read the notes on the form.
Train_e-RS_UserRequirements_v3.0.xlsm	This document asks you to set out what smartcards and roles you require.	Read the guidance notes to help you complete this form. Use in conjunction with Appendix C in this document, which gives further guidance and references the roles as they are named in training environment and matches them with the RA Codes.

Note: In the User Details worksheet of this form the cells highlighted must be modified to suit your needs before returning it to the testdata@hscic.gov.uk mailbox. These cells include:
• RA-AGENT
  o Used solely for smartcard cutting
• TRAINERONE
  o Name of first trainer eg yourself
• DELEGATEONE
  o Name of first delegate associated with TRAINERONE
  o Note that Middlename should be the initials of TRAINERONE
• A number of DELEGATE users should be created and thus associated with TRAINERONE		

MASTER v103_FULL_pdstestd	This document enables you to request and personalise the patients you will receive and be able to use during training.	It is **<u>highly recommended</u>** that instead of completing this form, you request a Sample Pack. This will contain approx. 153 patients of various gender, race, age etc and is much easier than completing the form. Please contact the TestData Team directly via testdata@hscic.gov.uk if you have any questions.

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Appendix B – Example organisations to request

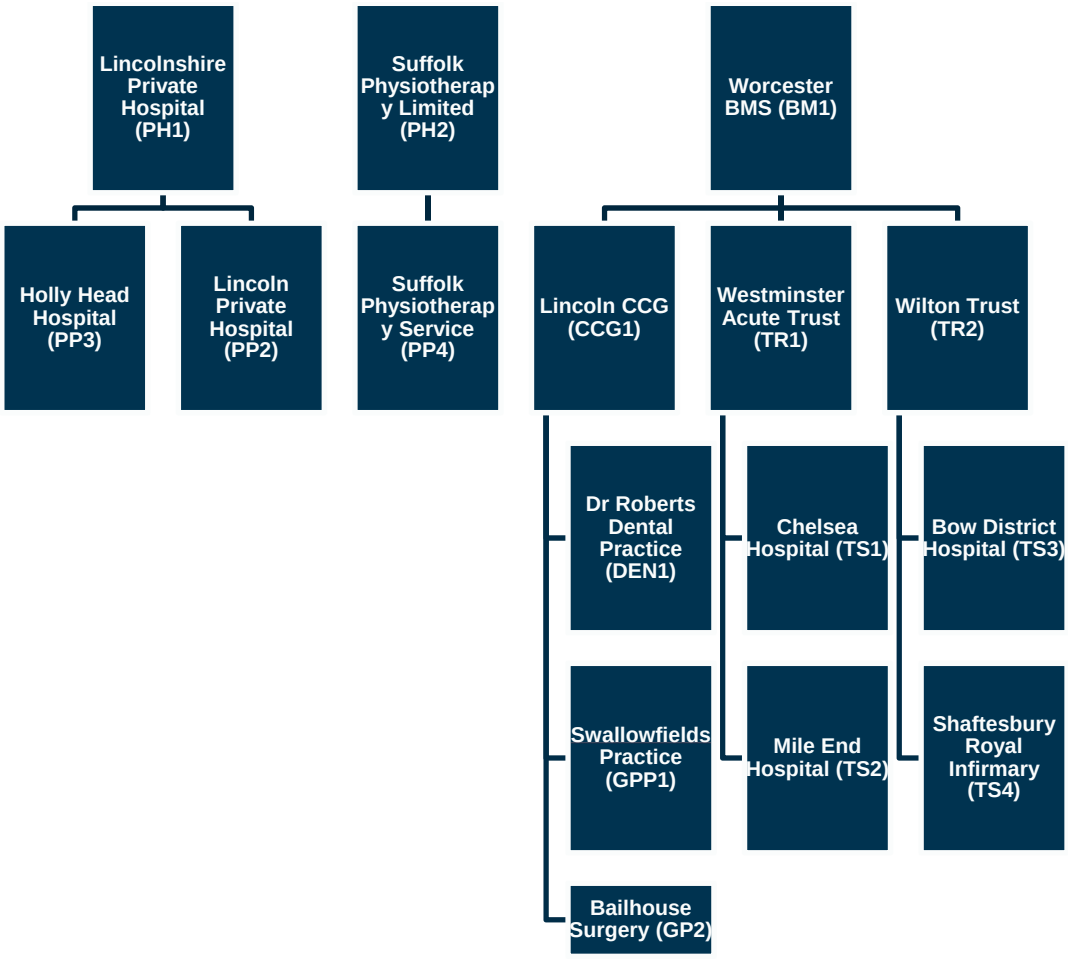
This is an example of the organisations and codes that you could request in order to be able to create and manage referrals, as you will have all the organisations you need to do this.

Please do not use the names below in your request, as they already exist!

Here we have:

- **1 private hospital (Lincolnshire Private Hospital)**
- **1 Any Qualified Provider (Suffolk Physiotherapy Limited)**
- **3 Clinical Commissioning Group (Lincoln CCG)**
  - **2 GP surgeries and 1 dental practice**
- **2 Hospitals (Westminster Acute Trust and Wilton Trust)**
  - **2 sites for each hospital**
- **An Appointments Line, equivalent to The Appointments Line (Worcester BMS)**

The codes in brackets are the ones used to identify hierarchy within HSCIC EMT.



You would then need to request smartcards and roles to be added to users working at the above organisations, which would give you a balance of referring and provider organisations.

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Appendix C – Requesting and creating training environment smartcards

HSCIC does not create smartcards for all training environment users. Therefore you, as the requestor, will:

- be sent one smartcard with RA rights; and
- need to work with your RA Agent to create smartcards for the relevant test organisation (assigned by the Test Data team).

It is **highly recommended** that smartcards are produced using a second smartcard reader, ie *not using a smartcard printer*.

No picture is required when creating smartcards for the training environment , therefore there is no need to use a printer. It has been found that using a smartcard printer can cause issues for non-live environments.

This also has the benefit of allowing organisations to re-use smartcards as they do not have a picture on them.

We have listed below a number of roles and further details to help you choose the ones you want to request your RA to add to the training environment smartcards.

Organisation Type	Role Name when logging into e-Referral Service	Job Role	RA Activity Code	RA Activity Name
Provider Organisation	BMS Admin	R1840	B1105	Perform CAB Appointments Line
	Service Definer	R0050	B1107	Maintain Service Configurations and Workgroups
	Service Provider Clinician	R0050	B1110	Manage Inbound Referrals
	Service Provider Clinician Admin	R0050	B1115	Proxy Manage Inbound Referrals
	Service Provider Admin	R0050	B1120	Manage Inbound Appointments
	Booking Manager	R0050		
	Additional Requirements Manager	R0050	B1145	Manage Additional Requirements
	Information Analyst	R0260	B1130	Perform Information Analysis
Referring Organisation	Referring Clinician	R0050	B1101	Referring Clinician
	Referring Clinician Admin	R0050	B1102	Referring Clinician Admin
	Referring Admin	R0260	B1103	Referring Admin
	Information Analyst	R0260	B1130	Perform Information Analysis
CCG	Commissioner	R1840	B1106	Maintain Commissioned Services
	BMS Admin	R1840	B1105	Perform CAB Appointments Line
	Information Analyst	R0260	B1130	Perform Information Analysis

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In addition, we have set out below a recommendation of numbers of smartcards, by your organisation type (and/or type of organisation you will be training for), and an explanation of the roles required for each smartcard.

Organisation type	Number of smartcards	Roles on smartcard
Provider	1 per Trainer	• Service Definer (to set up services and show functionality) • Referring Clinician (to create and process referrals) • Service Provider Clinician; Service Provider Clinician Admin; Service Provider Admin; BMS Admin; Booking Manager and Additional Requirements Manager (to show functionality)
	1 per Computer in a Training Room environment IF NOT Numbers will depend on individual need/size of organisation	• Service Provider Clinician; Service Provider Clinician Admin; Service Provider Admin; Booking Manager and Additional Requirements Manager (to learn functionality) • Service Definer – if training this role (to learn functionality)
Referrer	1 per Trainer	• Service Definer (to set up services) • Commissioner (to commission services to appear on the Primary Care Menu and demonstrate functionality) • Referring Clinician (to show functionality) • Service Provider Clinician; Service Provider Clinician Admin; Service Provider Admin; BMS Admin; (to process referrals)
	1 per Computer in a Training Room environment IF NOT Numbers will depend on individual need/size of organisation	• Referring Clinician; Referring Clinician Admin; Referring Admin (to learn functionality)

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Appendix D - Checklists

EITHER Checklist 1 – Starting from Scratch

Requirement	Details	Completed	Date
Training/environment requirement acknowledged		✓	
Enquiry made to HSCIC		✓	
Access Pack received		✓	
Forms received from HSCIC			
Complete and return forms to HSCIC	S2TRAIN Requirements Proforma Smartcard roles Data Endpoint Request		
Received RA smartcard			
Received data pack			
Received Endpoint information			
Liaise with local IT	Install registry settings Link endpoint (eg PAS and/or GP Clinical System)		
Liaise with local RA	Produce smartcards		
Downloand User Guide	From NHS e-Referral Service website at http://www.hscic.gov.uk/referrer/training/environment		
Set up data	Eg services, referrals, UBRNs on worklists		

OR Checklist 2 – Updating Training Spine Smartcard Details

Requirement	Details	Completed	Date
Training/environment requirement acknowledged		✓	
Enquiry made to HSCIC		✓	
Access Pack received		✓	
Forms received from HSCIC	Smartcard roles Data		
Complete and return forms to HSCIC	Smartcard roles Data		
Received RA smartcard			
Liaise with local IT	Install registry settings Link endpoint (eg PAS and/or GP Clinical System)		
Liaise with local RA	Produce smartcards		
Downloand User Guide	From NHS e-Referral Service website at http://www.hscic.gov.uk/referrer/training/environment		
Set up data	Eg services, referrals, UBRNs on worklists		

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